Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

Canada

MARKET ACCESS SECRETARIAT
Global Analysis Report

Commodity Innovation Series

Blueberries

in Food, Drink, and Pet Food

October 2017

Executive summary

- Canada is one of the largest producers and exporters of blueberries in the world. In 2016, Canada exported C$427 million in blueberries. Blueberry exports grew at a compound annual growth rate of 2% from 2012 to 2016.
- The United States, Japan, and Germany are the top markets for Canada's blueberry exports. Together, they received over 36% of Canada's blueberry exports in 2016.
- Frozen wild blueberries made up 48% of Canada's blueberry exports; fresh blueberries had a 25% market share, followed by frozen cultivated blueberries with a 22% market share.
- Fresh cranberries/blueberries delivered an outstanding performance in 2016, with a recorded total sales volume of 868,800 tonnes and a compound annual growth rate of 6.7% from 2012 to 2016 (Euromonitor, 2017).
- From 2007 to 2016, 17,548 blueberry-containing products were launched worldwide. During that period, the worldwide usage of blueberries in products grew at an average rate of 17% from 2007 to 2016.
- Nestlé, Danone, and Kellogg were the top companies to launch products containing blueberry ingredients.

Contents

Executive summary 1
Introduction 2
Retail sales 2
Trade overview 3
Blueberries as an ingredient 5
Products launched by category .6
Products launched by region 9
Products launched by company 12
For more information 14
Resources 14

Related reports

- Blueberry sector in Japan – 2017
- CI – Berry Opportunities in Germany – 2017
- Blueberries in the EU – 2016

Introduction

Blueberries have a number of characteristics which make them superior to other types of fruit (Euromonitor, 2014). They have a good shelf life, are convenient and are considered superfruits packed with antioxidants, fibre, vitamins, and minerals.

According to Euromonitor, North America has traditionally been (and still is) the world's biggest blueberry producer, but large volumes are now grown in the southern hemisphere, ensuring year-round availability. Chile is Latin America's most productive blueberry producer. Peru is also emerging as a major player in blueberry cultivation (Euromonitor, 2014).

Fresh cranberries/blueberries delivered an outstanding performance in 2016, with a recorded total sales volume of 868,800 tonnes, and a compound annual growth rate of 6.7% from 2012 to 2016. This ongoing consumption trend of fresh cranberries/blueberries is expected to continue across all regions around the world and is forecasted to see a compound annual growth rate of 5.8% from 2017 to 2021.

Euromonitor predicts that the volume of fresh cranberries/blueberries will rise by 25% over the 2017 to 2021 forecast period, surpassing the one million tonne mark in 2019. Furthermore, Singapore, the Philippines, Norway, Malaysia, and Sweden are expected to perform the best in this fruit category over the next decade (Euromonitor, 2014).

Retail sales

Historic Total Sales Volume of Fresh Cranberries and Blueberries in the World by Region, '000 Tonnes, from 2012 to 2016

Region	2012	2013	2014	2015	2016	CAGR* 2012–16
World	**670.9**	**729.3**	**788.4**	**819.8**	**868.8**	**6.7%**
Asia Pacific	189.4	212.7	235.7	251.6	275.3	9.8%
Eastern Europe	210.0	232.3	252.5	250.5	259.1	5.4%
North America	174.1	179.4	185.0	190.1	195.9	3.0%
Western Europe	84.5	90.4	99.4	110.7	120.8	9.3%
Latin America	5.3	6.0	6.5	6.9	6.7	6.0%
Australasia	3.9	4.4	4.9	5.3	5.9	10.9%
Middle East and Africa	3.8	4.1	4.4	4.8	5.2	8.2%

Forecast Total Sales Volume of Fresh Cranberries and Blueberries in the World by Region, '000 Tonnes, from 2017 to 2021

Region	2017	2018	2019	2020	2021	CAGR* 2017–21
World	**921.9**	**980.6**	**1,033.0**	**1,091.3**	**1,153.0**	**5.8%**
Asia Pacific	300.6	329.5	359.2	392.0	427.7	9.2%
Eastern Europe	272.1	288.3	300.2	315.8	333.0	5.2%
North America	201.6	207.7	213.7	219.5	225.1	2.8%
Western Europe	128.9	135.4	139.1	142.0	143.9	2.8%
Latin America	6.8	6.9	7.1	7.2	7.3	1.8%
Middle East and Africa	5.5	5.8	6.2	6.5	6.9	5.8%
Australasia	6.4	7.0	7.7	8.3	9.0	8.9%

Source for both: Euromonitor, 2017. CAGR-compound annual growth rate

Historic Total Sales Volume of Fresh Cranberries and Blueberries by the Top 10 Countries, '000 Tonnes, from 2012 to 2016

Country	2012	2013	2014	2015	2016	CAGR* 2012–16	Market Share
World	**670.9**	**729.3**	**788.4**	**819.8**	**868.8**	**6.7%**	
USA	164.00	169.00	174.30	179.10	184.60	3.0%	21.2%
South Korea	108.90	120.30	133.40	148.10	168.00	11.4%	19.3%
Poland	44.00	50.10	54.90	56.90	59.80	8.0%	6.9%
Ukraine	34.20	38.90	42.40	43.90	45.90	7.6%	5.3%
Afghanistan	24.30	28.40	31.80	33.80	36.30	10.6%	4.2%
Romania	22.70	25.60	27.90	28.70	29.90	7.1%	3.4%
Russia	36.80	39.70	42.10	31.40	29.00	-5.8%	3.3%
United Kingdom	12.60	13.80	16.00	20.90	25.40	19.2%	2.9%
Uzbekistan	21.70	25.00	27.80	24.50	22.80	1.2%	2.6%
Germany	14.20	16.00	18.40	19.30	20.10	9.1%	2.3%

Forecast Total Sales Volume of Fresh Cranberries and Blueberries by the Top 10 Countries, '000 Tonnes, from 2017 to 2021

Region	2017	2018	2019	2020	2021	CAGR* 2017–21	Market Share
World	**921.9**	**980.6**	**1,033.0**	**1,091.3**	**1,153.0**	**5.8%**	
South Korea	187.6	208.7	231.1	255.2	281.2	10.6%	24.4%
USA	189.9	195.6	201.3	206.7	212.0	2.8%	18.4%
Poland	63.1	67.0	69.9	73.4	77.2	5.2%	6.7%
Ukraine	48.3	51.2	53.3	55.8	58.5	4.9%	5.1%
Afghanistan	39.1	42.5	45.4	48.7	52.4	7.6%	4.5%
Romania	31.4	33.2	34.4	35.9	37.5	4.5%	3.3%
United Kingdom	28.7	31.3	32.4	33.2	33.6	4.0%	2.9%
Russia	28.2	28.5	29.4	30.8	32.6	3.7%	2.8%
Uzbekistan	22.4	22.9	23.9	25.3	27.1	4.9%	2.4%
Kazakhstan	18.2	19.6	20.7	22.0	23.4	6.5%	2.0%

Source for both: Euromonitor, 2017. CAGR-compound annual growth rate

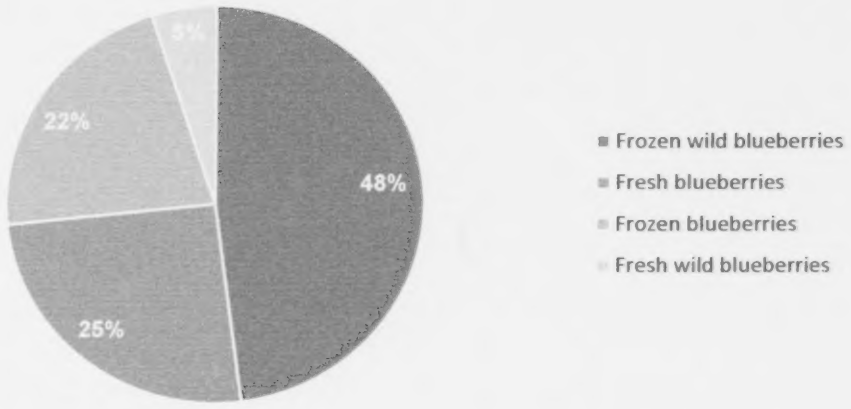
Trade overview

In 2016, Canada exported C$427.0 million in blueberries and achieved a compound annual growth rate of 2% from 2012 to 2016. Frozen wild blueberries made up 48% of Canada's blueberry exports, followed by fresh blueberries with a 25% market share, and frozen cultivated blueberries with a 22% market share. Fresh wild blueberries saw a significant growth rate of 22% from 2012 to 2016, while fresh blueberries saw a negative growth rate of 2% from 2012 to 2016. Wild blueberries made up 53% of Canada's blueberry exports in 2016.

The United States, Japan, and Germany are the top markets for Canada's blueberry exports. Together, they received over 36% of Canada's blueberry exports in 2016. Poland, Switzerland, and Australia saw the most significant growth rate for Canada's blueberry exports, with Poland seeing a compound annual growth rate of 110.4%; Switzerland, a compound annual growth rate of 44%; and Australia, a compound annual growth rate of 21.3% from 2012 to 2016.

Fresh blueberries and frozen wild blueberries made up 71% of Canada's blueberry exports to the United States. Frozen wild blueberries accounted for over 73% of Canada's blueberry exports to Japan, while frozen wild blueberries made up over 97% of Canada's exports to Germany.

Canada's Blueberry Exports by Category in 2016



Canada's Top Blueberry Exports by HS Code from 2012 to 2016, in C$ Millions

HS Code	Description	2012	2013	2014	2015	2016	CAGR* 2012–16
Canada's blueberry exports to the world		**398.66**	**347.28**	**378.72**	**469.89**	**426.95**	**1.7%**
08119011	Frozen wild blueberries	212.15	171.88	192.32	226.85	204.67	-0.9%
08104012	Fresh blueberries	100.06	87.86	98.74	124.58	108.54	2.1%
08119012	Frozen blueberries	76.8	75.06	73.36	94.43	92.25	4.7%
08104011	Fresh wild blueberries	9.64	12.49	14.3	24.04	21.49	22.2%

Canada's Top Blueberry Export Markets from 2012 to 2016, in C$ millions

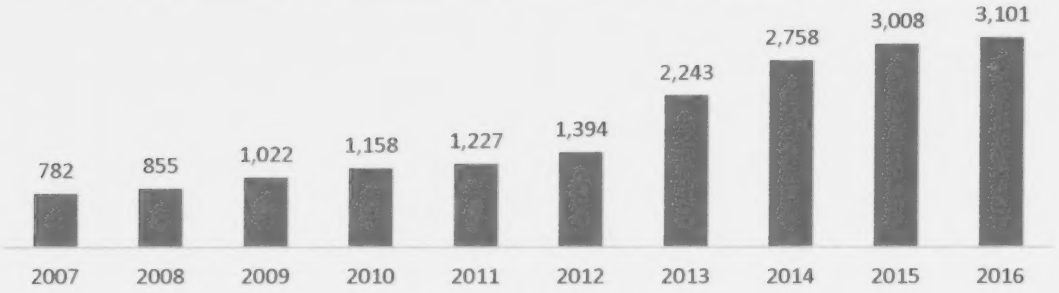
Country	2012	2013	2014	2015	2016	CAGR* 2012–16	Market Share
Total exports	**397.95**	**346.88**	**377.98**	**469.15**	**422.4**	**1.5%**	
United States	243.17	232.8	257.28	331.16	290.09	4.5%	68.7%
Japan	38.37	26.52	30.21	33.17	34.51	-2.6%	8.2%
Germany	33.06	24.56	26.15	30.47	28.56	-3.6%	6.8%
Belgium	13.06	6.22	6.96	10.73	10.76	-4.7%	2.5%
Switzerland	2.15	1.05	0.5	11.23	9.14	43.7%	2.2%
China	12.47	13.9	13.92	10.97	8.87	-8.2%	2.1%
France	11.91	11.16	9.2	9.74	8.74	-7.4%	2.1%
Australia	3.51	3.13	4.42	5.2	7.62	21.3%	1.8%
Netherlands	18.05	11.13	14.22	4.83	4.79	-28.2%	1.1%
Poland	0.2	0.84	0.82	2.14	3.88	110.4%	0.9%

Source for all: CATSNET, 2017 ***CAGR**- compound annual growth rate

Blueberries as an ingredient

From 2007 to 2016, 17,548 blueberry-containing products were launched worldwide. During this period, the worldwide usage of blueberries in products grew at an average rate of 17%. Food products containing blueberries made up 74.4% of the products launched, followed by drink products (19.6%), and pet food (6%).

Number of Blueberry-Containing Products Launched in the World, from 2007 to 2016



The United States launched the most blueberry products during the 10-year review period with a total of 3,229 products, and 70% of the products launched were in the food category. Canada came in second in terms of blueberry product launches, with a total of 1,439 products, predominantly in the food category. Germany came in third, with 1,027 blueberry products. Throughout the 10-year review period, South Korea, Denmark, Turkey, India, and South Africa saw a significant increase in blueberry-containing products being launched.

Over 66% of the products launched used blueberries as an ingredient. The remaining products used a variation of blueberry-based ingredients, such as blueberry juice (which made up 11.1% of products launched), blueberry juice concentrate (10.7%), and blueberry puree (8.4%).

Blueberry-Containing Products Launched by the Top Five Markets and Category, from 2007 to 2016

Country	Food	Drinks	Pet Food	Total Products by Country
Total Products by Category	**13,050**	**3,444**	**1,054**	**17,548**
United States	2,274	444	511	3,229
Canada	1,007	213	219	1,439
Germany	769	185	73	1027
Japan	628	195	39	862
United Kingdom	656	156	23	835
Other	7,716	2,251	189	10,156

Top Five Markets with the Fastest Growing Use of Blueberries in Products Launched, from 2007 to 2016

Country	2007	2011	2016	Total Products 2007–2016	Average Growth Rate
South Korea	2	53	136	639	60%
Denmark	2	10	44	153	41%
Turkey	1	4	15	58	35%
India	3	13	43	214	34%
South Africa	3	17	41	215	34%

Source for all: Mintel, 2017.

Blueberry Ingredients Used in Products Launched, from 2007 to 2016

Ingredient	Number of Products
Total blueberry ingredients	**17,548**
Blueberries	11,656
Blueberry juice	1,951
Blueberry juice concentrate	1,884
Blueberry puree	1,467
Blueberry flavour	745
Natural blueberry flavour	574
Blueberry powder	547
Bilberries	370
Blueberry extract	222
Blueberry pulp	161

Product launches by category

Food

From January 2007 to December 2016, 13,050 food products containing blueberries were launched. The top food subcategories likely to have blueberries were dairy, snacks, and bakery, desserts & ice cream, and breakfast cereals. The food category saw an average growth rate of 16% in blueberry-containing products launched. The subcategories to see the most significant average growth rate over 20% from 2007 to 2016 were meal and meal centres (34%), baby food, (28%) side dishes (22%), and chocolate confectionery (21%).

Top Food Subcategory for Blueberry-Containing Products Launched, from 2007 to 2016

Source for both: Mintel, 2017.

Top Five Food Subcategories with Blueberry-Containing Products, from 2007 to 2016

Subcategory		Number of Products
Dairy	Spoonable yogourt	1,637
	Drinking yogourt & liquid cultured milk	605
	Soft cheese desserts	137
	Plant-based spoonable yogourts (dairy alternatives)	109
	Flavoured milk	47
Snacks	Snack/cereal/energy bars	1,012
	Fruit snacks	709
	Snack mixes	342
	Rice snacks	25
	Potato snacks	16
Bakery	Cakes, pastries & sweet goods	862
	Sweet biscuits/cookies	658
	Baking ingredients & mixes	158
	Bread & bread products	69
	Savoury biscuits/crackers	6
Desserts & ice cream	Dairy-based ice cream & frozen yogourt	580
	Chilled desserts	265
	Shelf-stable desserts	159
	Frozen desserts	133
	Water-based ice lollies, pops & sorbets	117
Sugar & gum confectionery	Pastilles, gums, jellies & chews	514
	Lollipops	208
	Boiled sweets	119
	Gum	61
	Other sugar confectionery	56
	Dairy-based ice cream & frozen yogourt	580

Drink

From January 2007 to December 2016, 3,444 drink products containing blueberries were launched. The top food subcategories likely to have blueberries were juice drinks, hot beverages, and other beverages (e.g. meal replacements, beverage concentrate). The drink category saw an average growth rate of 17% in blueberry-containing products launched. The subcategories to see the most significant average growth rate over 20% were carbonated soft drinks (25%) and alcoholic drinks (21%) from 2007 to 2016.

Top Drink Subcategories for Blueberry-Containing Products Launched, from 2007 to 2016

Source for both: Mintel, 2017.

Top Five Drink Subcategories with Blueberry-Containing Products, from 2007 to 2016

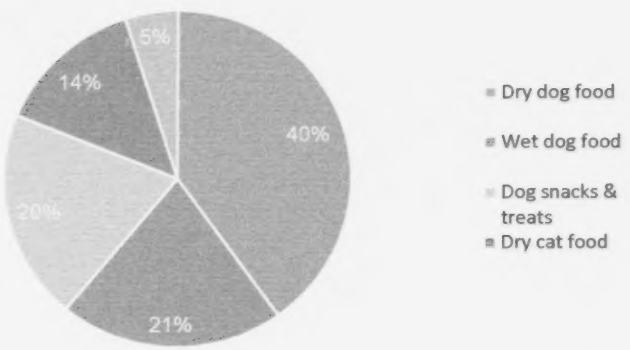
Subcategory		Number of Products
Juice drinks	Juice	879
	Nectars	613
	Fruit/flavoured still drinks	481
Hot beverages	Tea	478
	Malt & other hot beverages	8
	Coffee	6
Other beverages	Meal replacements & other drinks	184
	Beverage concentrates	131
	Beverage mixes	63
Alcoholic beverages	Flavoured alcoholic beverages	58
	Beer	50
	Cider	27
	Vodka	10
	Liqueur	9
RTDs	Rtd (iced) tea	120
	Rtd (iced) coffee	5

Pet food

From January 2007 to December 2016, 1,054 pet food products containing blueberries were launched. The top food subcategories likely to have blueberries were dry dog food, wet dog food, and dog snacks and treats.

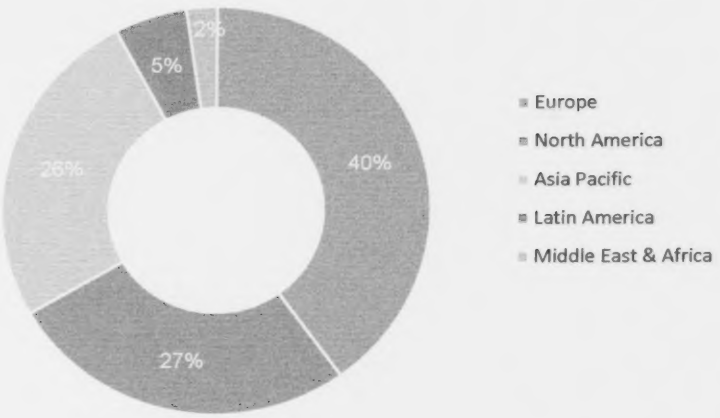
The pet food category posted an average growth rate of 37% from 2006 to 2016. The subcategories to see the most significant average growth rate over 20% from 2007 to 2016 were wet dog food (50%) and dog snacks and treats (48%).

Top Pet Food Subcategories for Blueberry-Containing Products Launched, from 2007 to 2016



Source for both: Mintel, 2017.

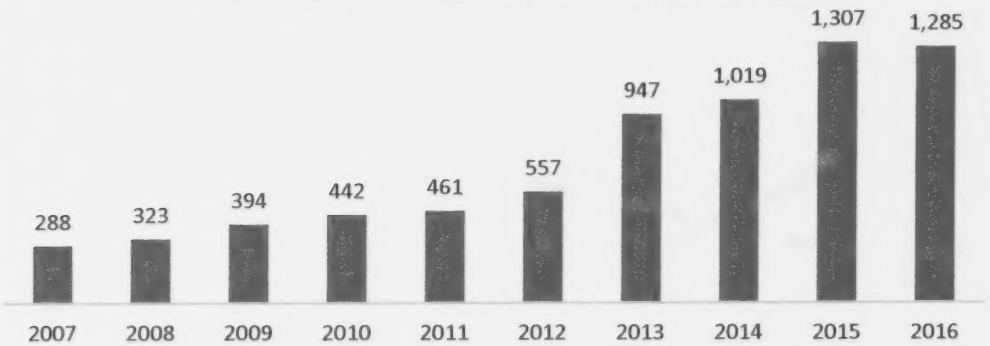
Products launched by region



Europe

Of all the regions in the world, Europe saw the most blueberry-containing products launched from 2007 to 2016, with an average growth rate of 18% and 7,023 products launched in total. In 2007, only 288 products containing blueberries were launched, while this number increased to 1,285 products in 2016. Over 83.1% of the products launched in the region were entirely new products, while the remaining were relaunches. Over 50.4% of the blueberry-containing products launched in the region went to Germany, the United Kingdom, France, Finland, and Italy. The top claims for this region were commonly associated with health and wellness and environmentally friendly claims such as no additives/preservatives, organic, and environmentally friendly packaging.

Number of Blueberry-Containing Products in Europe, from 2007 to 2016

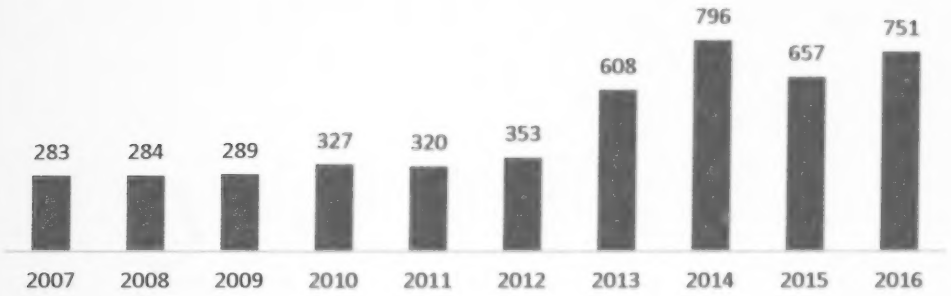


Source for both: Mintel, 2017.

North America

North America is the second-largest region in the world for launches of blueberry-containing products, with an average growth rate of 11% and 4,668 products launched in total. In 2007, 283 products were launched; that increased to 751 in 2016. Over 75.4% of the products launched in North America were entirely new product introductions, while the remaining 24.6% were relaunches. The top claims for this region were kosher, low/no/reduced allergens, no additives/preservatives, and gluten-free.

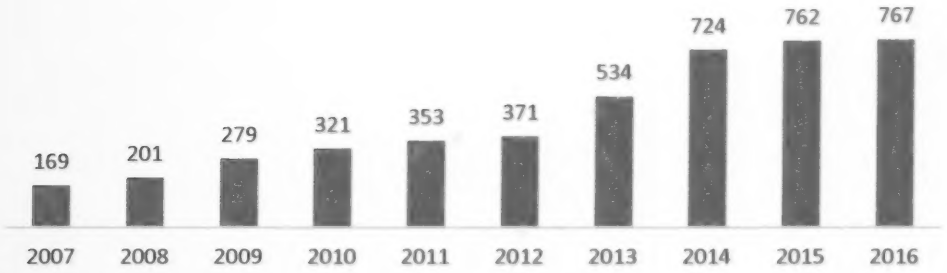
Number of Blueberry-Containing Products Launched in North America, from 2007 to 2016



Asia Pacific

From 2007 to 2016, 4,481 blueberry-containing products were launched, an average growth rate of 18%. In 2007, 169 products were launched and this increased to 767 in 2016. The majority of the products launched throughout the review period were entirely new products introduced. Japan, China, and South Korea accounted for 51% of the products launched in the region during the review period. The top claims for this region were no additives/preservatives, environmentally friendly packaging, low/no/reduced fat, and low/no/reduced sugar.

Number of Blueberry-Containing Products Launched in Asia Pacific, from 2007 to 2016

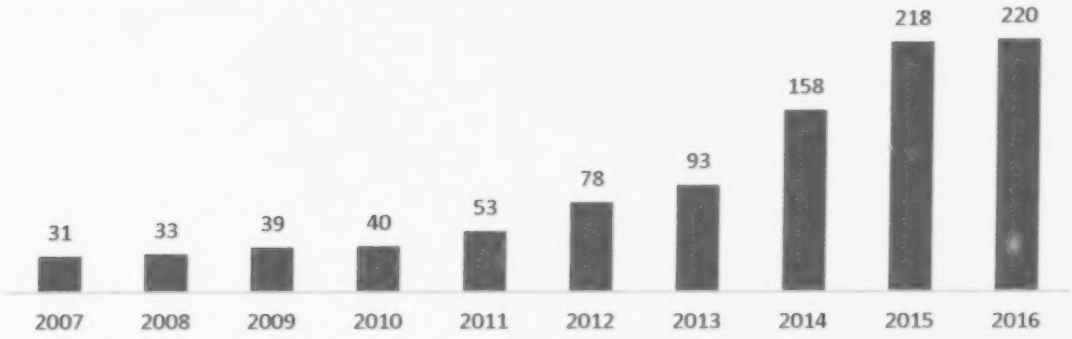


Source for both: Mintel, 2017.

Latin America

From 2007 to 2016, 963 products containing blueberries were launched, an average growth rate of 24%. In 2007, there were 31 products launched; this increased to 220 products launched in 2016. Mexico, Brazil, and Argentina received 67.1% of the products launched in the region. The top claims for this region were low/no/reduced allergen, gluten-free, kosher, and no additives/preservatives.

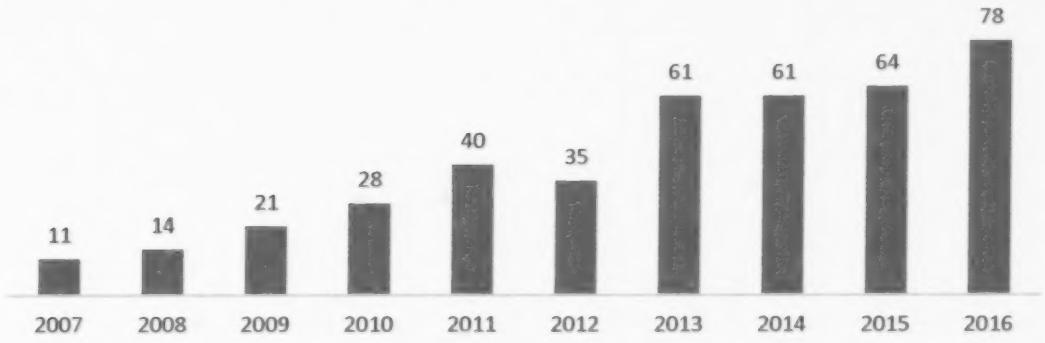
Number of Blueberry-Containing Products Launched in Latin America, from 2007 to 2016



Middle East and Africa

From 2007 to 2016, 413 products containing blueberries were launched in the Middle East and Africa combined, for an average growth rate of 24%. South Africa, Israel, and Egypt accounted for 81% of the products launched in the region, most of which were new product introductions. The common claims used in this region for blueberry-containing products launched were kosher, no additives/preservatives, halal, and environmentally friendly packaging.

Number of Blueberry-Containing Products Launched in the Middle East and Africa, from 2007 to 2016



Source for both: Mintel, 2017.

Products launched by company

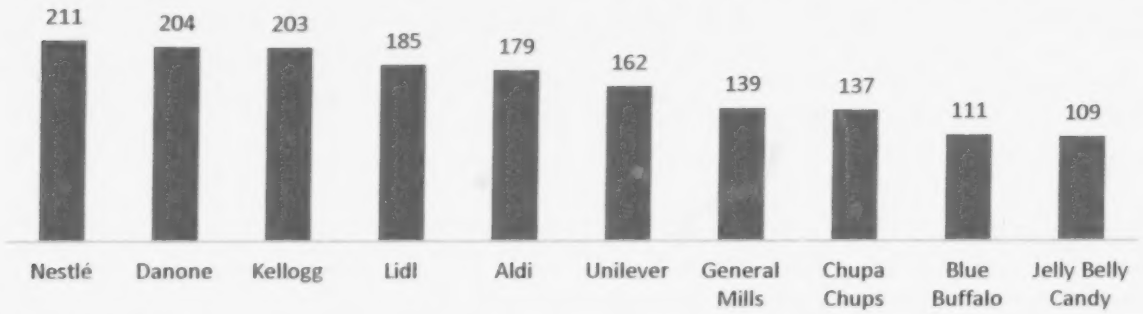
From 2007 to 2016, **Nestlé** launched the most products containing blueberries, with a total of 211 products during the 10-year review period. Most of the products launched were new varieties and range extensions (37%) and new products (32.2%), while the rest were relaunches due to new packaging or new formulations. Nestlé product launches occurred within the sugar and gum confectionery, desserts and ice cream, and baby food subcategories. Over 84% of the company's product launches occurred in Europe (107 products) and in the Asia Pacific region (71 products).

Danone is the second-largest company to launch the most blueberry-containing products, with a total of 204 products in the 10-year review period. Most of the products launched by the company were new varieties / range extensions (78) and new product introductions (64). Danone launched most of these products in Europe (143), North America (32), and Latin America (29).

Kellogg was the third-largest company to launch the most products containing blueberries, with a total of 203 products during the review period. Most of the products launched were relaunches based on new packaging (78), new products (51), and new varieties / range extensions (47). Kellogg launched most of its products in North America (95 products), primarily in the United States, followed by Europe (41 products) and the Asia Pacific region (32 products).

The companies that saw an ongoing increase in products using blueberries in the most recent years of the review period were Lidl, Woolworths, Hero, Yoplait, and Costco Wholesale.

Top 10 Companies in the World to Launch Blueberry-Containing Products, from 2007 to 2016



Source: Mintel, 2017

List of Companies Launching Blueberry-Containing Products by Region, from 2007 to 2016

Europe	Number of Products
Lidl	184
Danone	143
Unilever	123
Nestlé	107
Tesco	103

North America	Number of Products
Blue Buffalo	110
Kellogg	95
General Mills	86
Loblaws	76
Aldi	72

Asia Pacific	
Meiji	87
Nestlé	71
Aeon	47
Ohayo Dairy Products	43
Perfetti Van Melle	39

Latin America	
Kellogg	29
Supermercados Internacionales H-E-B	17
Danone	16
PepsiCo	14
Wal-Mart	14

Middle East & Africa	
Woolworths	49
Chupa Chups	13
Pick n Pay	11
Nestlé	10
Shoprite Checkers	9

List of Companies Launching Products Containing Other Berries, from 2007 to 2016

Company	Number of Products
Lidl	1,478
Danone	1,409
Nestlé	1,229
Aldi	1,089
Kellogg	1,017
Tesco	901
Marks & Spencer	856
Unilever	844
Perfetti Van Melle	498
Meiji	435
Woolworths	426
Kraft Foods	424
Asda	400
Wal-Mart	392
General Mills	379
Waitrose	340
Lindt & Sprüngli	329
Ocean Spray	325
Carrefour – CMI	302
Mondelez	283

Source for both: Mintel, 2017.

For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services**
  www.tradecommissioner.gc.ca/

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found on the *International Market Intelligence* page at the following link, arranged by region:

- http://www.agr.gc.ca/eng/industry-markets-and-trade/foreign-market-information-by-region/?id=1410083148447

Resources

Global Trade Tracker, 2017.

Mintel, Global New Products Database 2017.

Euromonitor, Blueberries the Most Dynamic Fruit in 2013, 2014.

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Commodity Innovation Series

Blueberries in Food, Drink, and Pet Food
Global Analysis Report

Prepared by: Ranna Bernard, Market Analyst

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